

Message Text

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TO SECSTATE WASHDC 8042
INFO AMEMBASSY ANKARA
AMEMBASSY DACCA
AMEMBASSY KABUL
AMEMBASSY NEW DELHI
AMEMBASSY TEHRAN

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SUBJ: ECONOMIC SURVEY OF PAKISTAN 1977-1978

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SUMMARY AND INTRODUCTION: THE ECONOMIC SURVEY OF PAKISTAN
1977-78 (JULY 1, 1977 - JUNE 30, 1978) CHARACTERIZES PAKI-
STAN'S ECONOMY AS COMING BACK STRONGLY FROM A BAD YEAR IN
1976-1977 AND POISED FOR ANOTHER GOOD YEAR IN PFY1979.
POLICIES INITIATED BY THE MARTIAL LAW REGIME
ARE GIVEN MUCH OF THE CREDIT. ON THE BASIS OF PROJECTIONS
FROM JUNE - MARCH DATE PRESENTED IN THE REPORT, THIS
PRESENTATION IS SELECTIVELY OPTIMISTIC, SINCE THE BASIC PRO-
BLEMS OF LOW PRODUCTIVITY IN AGRICULTURE (SELF-SUFFICIENCY
IN WHEAT IS FARTHER AWAY THAN EVER) AND INDUSTRY AND AN
UNCERTAIN INVESTMENT CLIMATE STILL EXIST. HOWEVER,
PAKISTAN'S ECONOMY UNDENIABLY DID IMPROVE, IN ALMOST
EVERY SECTOR (EXCEPT WHEAT). THE NATIONAL ACCOUNTS (SUMMARIZED
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IN REFTEL A) SHOWED AN INCREASE IN REAL TERMS IN GNP OF
9.2 PERCENT IN GDP OF 6.5 PERCENT AND IN PER CAPITA INCOME
OF SIX PERCENT. THE STRONG PERFORMANCE OF GNP (AS COM-
PARED WITH GDP) WAS LARGELY THE RESULT OF WORKERS' RE-
MITTANCES WHICH WENT FROM \$ 650 MILLION TO \$ 1.15 BILLION.
AGRICULTURAL OUTPUT MAY HAVE INCREASED 4.3 PERCENT. MANUFACTURING
WENT UP 4.7 PERCENT. GROSS FIXED CAPITAL OUTLAYS WENT UP

15.5 PERCENT OF WHICH 91 PERCENT REPRESENTED PUBLIC SECTOR INVESTMENT, A LOT OF WHICH WENT TO THE KARACHI STEEL MILL. OGDC RECEIVED 75 PERCENT OF TOTAL MINERAL INVESTMENT. PAKISTAN'S BALANCE OF PAYMENTS SHOWED A NET INFLOW OF \$ 182 MILLION DOLLARS WITH THE CAPITAL ACCOUNT SURPLUS OF \$ 843 MILLION MORE THAN OFFSETTING THE CURRENT ACCOUNT DEFICIT (\$ 661 MILLION). AID INFLOWS WERE ABOUT THE SAME, WITH THE CONSORTIUM COUNTRIES STILL CONTRIBUTING THE BULK (\$ 768 MILLION). MONETARY ASSETS ROSE 13.2 PERCENT COMPARED TO 18 PERCENT LAST YEAR. PAKISTAN'S PRICE INDICES RECORDED SINGLE DIGIT INFLATION, THE CONSUMER PRICE INDEX WENT UP 7.3 PERCENT, THE WHOLESALE PRICE INDEX 6.7 PERCENT AND THE SENSITIVE PRICE INDEX OF 28 ESSENTIAL COMMODITIES ONLY 3.7 PERCENT.

THE REPORT WAYS THAT

RATES OF BIRTH (40 PER THOUSAND), ILLITERACY (73 PERCENT) AND UNEMPLOYMENT (13 PERCENT), WERE TOO HIGH. POPULATION IN JANUARY 1978 WAS 75.62 MILLION AND GROWING AT 3 PERCENT ANNUALLY. OF TOTAL PRIMARY SCHOOL AGE CHILDREN 54 PERCENT ATTENDED SCHOOL DURING PFY1978, 1,218 NEW PRIMARY SCHOOLS WERE SCHEDULED FOR COMPLETION DURING THE YEAR. PAKISTAN HAD ONE HOSPITAL BED PER 1,660 PEOPLE AND ONLY 32 PERCENT OF THE POPULATION IS WITHIN TWO MILES OF HEALTH CARE. POPULATION PLANNING PROGRAMS DID NOT MEET EXPECTATIONS. PROGRAMS FOR DISTRIBUTION OF CONTRACEPTIVES REACHED LESS THAN 50 PERCENT OF THEIR TARGET.

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WE SHALL REPORT SOME COMMENTS LATER.
END SUMMARY

AGRICULTURE : THE AGRICULTURAL INDEX 1959-60 ; 100) ROSE TO 214 DURING THE CURRENT YEAR, 5.4 PERCENT ABOVE LAST YEAR'S 203. THE LARGEST INCREASE WAS IN COTTON, WHICH ROSE 30 PERCENT TO 3.2 MILLION BALES COMPARED TO LAST YEAR'S FLOOD AND PEST DAMAGED CROP OF 2.4 MILLION BALES. PRODUCTION OF FOOD GRAINS INCREASED 1.6 PERCENT, WITH RICE UP 6 PERCENT AND MAIZE UP 8.7 PERCENT. PRODUCTION WAS UNCHANGED FOR MILLET AND SORGHUM, AND DOWN 8.9 PERCENT FOR BARLEY. WHEAT PRODUCTION IS SHOWN AS EVEN WITH LAST YEAR'S 8.8 MILLION TONS, BUT GOP OFFICIALS HAVE SCALED IT DOWN TO 8.2 MILLION TONS AS A RESULT OF RUST, UNSEASONABLY WARM WEATHER JUST BEFORE HARVEST TIME, AND A SLIGHT DECREASE IN ACREAGE. SUGARCANE DECLINED BY .3 PERCENT BECAUSE OF PEST ATTACKS. FISHING OUTPUT INCREASED BY 32.8 PERCENT, FORESTRY BY 4.1 PERCENT AND LIVESTOCK 1.9 PERCENT.

2. INPUTS OF WATER, FERTILIZER, PESTICIDES AND CREDIT ARE ESTIMATED TO INCREASE OVER LAST YEAR. WATER AVAILABILITY

SHOULD INCREASE TO 103 MAF, OF WHICH 9.3 MAF
WILL COME FROM TARBELA DAM. FERTILIZER USAGE SHOULD INCREASE 8
PERCENT TO 680,000 NUTRIENT TONS. PLANT
PROTECTION MEASURES ARE ESTIMATED TO COVER 12.37 MILLION
ACRES IN 1977-78, UP 6 PERCENT OVER LAST YEAR. RURAL
CREDIT TARGETS WERE 15 PERCENT HIGHER THAN LAST
YEAR, RS.2035 MILLION COMPARED TO RS. 1769 MILLION.
DATA FOR THE FIRST SIX MONTHS OF THE FISCAL YEAR INDICATE
THAT THE BANKS WERE AHEAD OF THEIR TARGETS.

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3. THERE WAS LITTLE CHANGE IN THE PROVISION OF AGRICUL-
TURAL EXTENSION SERVICES THOUGH SOME PROGRESS WAS MADE
IN THE BARANI (RAINFED) DEVELOPMENT PROJECT IN LAYING
OUT DEMONSTRATION AND RESEARCH PLOTS. THE NUMBER OF FIELD
ASSISTANTS AND AGRICULTURAL ASSISTANTS INCREASED BY
SIX AND FIVE PERCENT RESPECTIVELY.

4. THE SURVEY RECOGNIZES THAT PAKISTAN'S RURAL DEVELOP-
MENT PROGRAM HAS NOT REALLY GOTTEN OFF THE GROUND. THE
NUMBER OF MARKAZ-MULTI SERVICE CENTERS PROVIDING AGRIC-
ULTURAL INPUTS, MARKETING AND HEALTH FACILITIES TO THE
RURAL POPULATION - REMAINED AT 137, THE SAME NUMBER
QUOTED IN LAST YEAR'S ECONOMIC SURVEY. THIS YEAR'S SUR-
VEY RECOGNIZES THAT THE AMOUNT OF COORDINATION AMONG
VARIOUS FEDERAL AND PROVINCIAL DEPARTMENTS HAS BEEN A
SOURCE OF BOTTLENECKS FOR PROGRESS IN RURAL DEVELOPMENT.

GEN. ZIA'S RURAL DEVELOPMENT STRATEGY, ANNOUNCED IN JANUARY (REF B), IS EXPECTED TO GIVE HIGH LEVEL ATTENTION TO THE RESOLUTION OF SOME OF THESE PROBLEMS.
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5. MANUFACTURING AND MINING. THE MANUFACTURING SECTION EXPANDED BY 4.7 PERCENT IN 1977-78 IN CONTRAST TO ONE PERCENT IN 1976-77. INCREASES IN SUGAR PRODUCTION (22.9 PERCENT), CIGARETTES (12.4 PERCENT) AND VEGETABLE GHEE (15.9 PERCENT) WERE MAJOR FACTORS IN THE EXPANSION WHILE CONTINUED DEPRESSION IN COTTON YARN (UP 1.7 PERCENT) AND COTTON CLOTH (DOWN 6.5 PERCENT) KEPT THE OVERALL EXPANSION FROM BEING GREATER.
GROSS FIXED CAPITAL OUTLAYS INCREASED 15.5 PERCENT TO RS. 7295 MILLION, 91 PERCENT OF WHICH WAS IN THE PUBLIC SECTOR. CAPITAL FORMATION IN THE PRIVATE SECTOR INCREASED BY ONLY 4.8 PERCENT TO RS. 1831.2 MILLION.
MINERALS ARE STILL AN INSIGNIFICANT PART OF PAKISTAN'S ECONOMY, CONTRIBUTING ONLY .57 PERCENT OF GNP. PUBLIC SECTOR FINANCING HAS CONCENTRATED ON OGDC, ALLOCATING RS. 450 MILLION IN PFY77-78, ALMOST 75 PERCENT OF THE TOTAL INVESTMENT IN THE MINERALS SECTOR.

6. BOP, TRADE AND AID. PAKISTAN'S BALANCE OF PAYMENTS IMPROVED THIS YEAR. THE CURRENT ACCOUNT DEFICIT WAS ESTIMATED AT \$ 661 MILLION, DOWN 27 PERCENT FROM LAST YEAR, WHICH WAS MORE THAN OFFSET BY A CAPITAL ACCOUNT SURPLUS OF \$ 843 MILLION, WHICH WAS UP 42 PERCENT OVER PFY1977. THUS THERE WAS A NET MONETARY INFLOW OF \$ 182 MILLION COMPARED TO LAST YEAR'S OUTFLOW OF \$ 309 MILLION.
ON MERCHANDISE ACCOUNT, PAKISTAN'S TRADE DEFICIT WIDENED BY 17 PERCENT OVER LAST YEAR. IMPORTS WERE ESTIMATED AT \$ 2,809 MILLION (PLUS 16 PERCENT) AND EXPORTS AT \$ 1,306 MILLION (PLUS 15 PERCENT) LEAVING A \$ 1,503 MILLION DEFICIT. THE SURPLUS ON INVISIBLE ACCOUNT MORE THAN DOUBLED OVER LAST YEAR, RISING TO \$ 842 MILLION FROM \$ 384 MILLION. THE INCREASE WAS DUE TO WORKERS'
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REMITTANCES WHICH ROSE TO \$ 1.15 BILLION FROM \$ 650 MILLION IN PFY 1977.

COMMITMENTS FOR FOREIGN ASSISTANCE WERE \$ 1,110 MILLION THIS YEAR, MARGINALLY (.4 PERCENT) DOWN FROM LAST YEAR. OF THE TOTAL, CONSORTIUM COUNTRIES CONTRIBUTED \$ 768 MIL-

LION (\$ 684 MILLION IN PFY 1977), CONSORTIUM COUNTRY AID, OUTSIDE THE FORMAL CONSORTIUM MECHANISM, INCLUDING COMMERCIAL CREDITS \$ 107 MILLION (MILLION IN PFY 1977), NON-CONSORTIUM, EXCLUDING MUSLIM COUNTRIES, \$ 45 MILLION (\$ 14 MILLION IN PFY 1977) AND MUSLIM COUNTRIES \$ 190 MILLION (\$ 240 MILLION IN PFY 1977).

DISBURSEMENTS ARE ESTIMATED AT \$ 1,075 MILLION, UP 12 PERCENT OVER LAST YEAR, MAINLY BECAUSE OF INCREASED WHEAT AND EDIBLE OIL IMPORTS. THE PATTERN OF DISBURSEMENTS WAS: PROJECTS - \$ 663 MILLION, NON-FOOD COMMODITY IMPORTS - \$ 155 MILLION, FOOD IMPORTS - \$ 176 MILLION, NON-FOOD COMMODITY IMPORTS - \$ 155 MILLION, FOOD IMPORTS - \$ 176 MILLION (\$ 96 MILLION FOR WHEAT, \$ 80 MILLION FOR EDIBLE OIL) AND \$ 81 MILLION OF BALANCE OF PAYMENTS SUPPORT FROM OPEC (\$ 11 MILLION) SAUDI ARABIA (\$ 30 MILLION) AND KUWAIT (\$ 40 MILLION)

DEBT SERVICE FIGURES ARE GIVEN ONLY UP TO PFY 1977. THE FIGURES GIVEN SHOW NET TRANSFERS AS A PERCENT OF GROSS DISBURSEMENTS DECLINING FROM 78 PERCENT IN PFY 1975 TO 67 PERCENT IN PFY 1976 TO 62 PERCENT IN PFY 1977. PAKISTAN'S DEBT SERVICE RATIO TO TOTAL FOREIGN EXCHANGE EARNINGS FOR THOSE YEARS WAS 16 PERCENT, 20 PERCENT AND 18 PERCENT RESPECTIVELY.

7. MONEY AND BANKING. DURING JUNE 1977 - MARCH 1978 PERIOD, PAKISTAN'S TOTAL MONETARY ASSETS (CURRENCY, DEMAND AND TIME DEPOSITS) ROSE 13.2 PERCENT TO RS.64,390 MILLION (\$ 6,504 MILLION) COMPARED TO 18 PERCENT FOR THE CORRESPONDING PERIOD LAST YEAR. OF THE COMPONENTS OF TOTAL MONETARY ASSETS, CURRENCY IN CIRCULATION UNCLASSIFIED

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INCREASED RS . 2980 MILLION (19 PERCENT) DEMAND LIABILITIES AT SCHEDULED BANKS WENT UP RS. 1934 (NINE PERCENT), TIME LIABILITIES AT SCHEDULED BANKS ROSE RS. 2878 MILLION (15.9 PERCENT) AND MISCELLANEOUS DEPOSITS WITH THE STATE BANK DECLINED A TOTAL OF RS.270 MILLION (-13.8 PERCENT). THE INCREMENT IN MONETARY ASSETS OF RS.7522 MILLION WAS THE RESULT OF BORROWING BY THE PRIVATE SECTOR (RS.4255 MILLION), PUBLIC SECTOR ENTERPRISES (RS.1403 MILLION), AND GOVERNMENT (RS.1483 MILLION NET). THE FOREIGN SECTOR ACCOUNTED FOR AN EXPANSION OF RS.1708 MILLION, LARGELY BECAUSE OF WORKERS' REMITTANCES. THESE EXPANSIONARY ITEMS WERE OFFSET BY THE CONTRACTION CAUSED BY MISCELLANEOUS FACTORS TO THE EXTENT OF RS.1326 MILLION.

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THE BANKING SYSTEM RECORDED AN INCREASE IN DEMAND
DEPOSITS OF 12.2 PERCENT DURING JULY 77 - MARCH 78
COMPARED TO 18.2 PERCENT IN THE CORRESPONDING PERIOD
OF LAST YEAR. HOWEVER, TIME DEPOSITS INCREASED 16 PERCENT
THIS YEAR AND NINE PERCENT LAST YEAR. THE SHIFT IN
DEPOSITS IS ATTRIBUTED TO HIGHER INTEREST RATES ON
TIME DEPOSITS AND THE INCREASE IN REMITTANCES.
TOTAL BANK CREDIT OUTSTANDING INCREASED RS.2,974 MIL-
LION (9.8 PERCENT) COMPARED TO 23.1 PERCENT LAST YEAR.
LOANS TO THE PRIVATE SECTOR AND PUBLIC SECTOR ENTERPRISES
WENT UP BY RS. 3849 MILLION, AN INCREASE OF 15 PERCENT.
TOTAL CREDIT OUTSTANDING WAS BROUGHT DOWN BY RS.875 MIL-
LION BECAUSE OF REPAYMENT OF COMMODITY LOANS BY THE
GOVERNMENT. THIS YEAR'S GOVERNMENT REPAYMENTS, COMPARED
TO 275 MILLION OF REPAYMENTS LAST YEAR, WAS CAUSED BY
LOWER DOMESTIC PROCUREMENT OF WHEAT, FERTILIZER AND EDIBLE
OIL THAN ORIGINALLY PLANNED.

MANDATORY CREDIT ALLOCATIONS INCREASED FOR ALMOST ALL
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PRIORITY SECTORS OVER LAST YEAR. THIS YEAR'S ALLOCATIONS
WERE AGRICULTURAL PRODUCTION RS.720 MILLION (PLUS 29
PERCENT), TUBEWELLS, TRACTORS, ETC., RS.160 MILLION
(PLUS 23 PERCENT), HOUSING RS.110 MILLION (PLUS 10 PERCENT)

AND BUSINESS AND INDUSTRY RS.850 MILLION (NO CHANGE).

8. PRICES.

PAKISTAN'S THREE PRICE INDICIS ALL REGISTERED SINGLE DIGIT INFLATION FOR THE JUNE 1977 - MARCH 1978 PERIOD. THE CONSUMER PRICE INDEX (1969-70 - 100) ROSE 7.3 PERCENT COMPARED TO 12.3 PERCENT FOR THE CORRESPONDING PERIOD LAST YEAR. WHOLESALE PRICES (1969-70 : 100) WENT UP 6.7 PERCENT DOWN FROM EIGHT PERCENT. THE SENSITIVE PRICE INDEX OF 28 ESSENTIAL COMMODITIES (1969-70 : 100) SHOED THE LOWEST INCREASE OF 3.7 PERCENT COMPARED TO 12.6 PERCENT FOR THE SAME PERIOD LAST YEAR.

9. TRANSPORTATION AND COMMUNICATIONS. THE GOP ALLOCATED RS. 3,856 MILLION IN 1977-78 TO THE TRANSPORTATION AND COMMUNICATIONS SECTOR. OF THIS AMOUNT 26 PERCENT WAS ALLOCATED TO PAKISTAN RAILWAYS LARGELY FOR REPLACEMENT OF ITS WORN OUT AND ANTIQUATED ROLLING STOCK, 17 PERCENT WENT TO EXPENDITURES ON PORT QASIM, NOW UNDER CONSTRUCTION, AND 12 PERCENT WAS ALLOCATED TO EXPAND AND UPDATE THE TELEGRAPH AND TELEPHONE SYSTEM.

10. ENERGY SUPPLY. OIL PROVIDED 39.9 PERCENT OF PAKISTAN'S ENERGY IN PFY 77-78 AND NATURAL GAS SUPPLIED 36.2 PERCENT, TALLING OVER 75 PERCENT OF PAKISTAN'S TOTAL CONSUMPTION. IT IS ESTIMATED THAT PRODUCTION OF ELECTRICITY INCREASED BY 14.5 PERCENT IN PFY 77-78 TO 10,000 MILLION KWH. THIS INCREASE IS TOTALLY ACCOUNTED UNCLASSIFIED

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FOR BY THE INCREASE IN HYDRO-ELECTRIC POWER WHICH INCREASED BY 40.3 PERCENT TO 7,294 MILLION KWH, 73 PERCENT OF THE TOTAL. IN CONTRAST, POWER FROM THERMAL POWER STATIONS DROPPED BY 23.2 PERCENT TO 2,726 MILLION KWH. THE INCREASE IN HYDRO-ELECTRIC POWER WAS CAUSED LARGELY BY PRODUCTION FROM FOUR NEW POWER UNITS IN THE TARBELA DAM.

10. SOCIAL SECTOR. THE SURVEY CHARACTERIZES PAKISTAN'S HUMAN RESOURCES PROBLEM AS ONE OF HIGH RATES OF BIRTH, ILLITERACY AND UNEMPLOYMENT. TOTAL POPULATION AS OF JANUARY 1978 WAS ESTIMATED AT 75.62 MILLION AND GROWING AT THREE PERCENT PER YEAR WITH A CRUDE BIRTH RATE OF 40 PER THOUSAND (1972-77 AVERAGE). THE LAST CENSUS (1972) ESTIMATED THAT 75 PERCENT OF THE POPULATION LIVED IN RURAL AREAS BUT THERE HAS BEEN SIGNIFICANT URBAN MIGRATION SINCE THAT TIME. LOUT OF A TOTAL POPULATION OVER 10 YEARS OLD OF 42.37 MILLION IN 1973, 19.76 MILLION BELONGED TO THE WORK FORCE . OF THESE,

FARMING AND RELATED OCCUPATIONS EMPLOYED 56.6 PERCENT. THERE WERE 59,388 PRIMARY SCHOOLS IN 1977-78 ATTENDED BY 5.95 MILLION CHILDREN, 54 PERCENT OF THE TOTAL PRIMARY SCHOOL AGE CHILDREN . AT BOTH THE PRIMARY AND SECONDARY LEVELS, ONLY 25 PERCENT OF THE STUDENTS WERE FEMALE. THE ADP FOR 1977-78 CALLED FOR OPENING 1218 NEW PRIMARY SCHOOLS, COMPLETING CONSTRUCTION ON 1654 SCHOOL BUILDINGS, AND IMPROVING 4322 EXISTING PRIMARY SCHOOL BUILDINGS.

PAKISTAN HAS APPROXIMATELY 46,000 HOSPITAL BEDS - OR ONE BED FOR EVERY 1660 CITIZENS. THESE BEDS ARE CONCENTRATED IN THE URBAN AREAS ALONG WITH THE MAJORITY OF THE 14,000 DOCTORS AND 43,000 NURSES. 9,632 PERCENT OF THE RURAL POPULATION IS WITHIN A TWO MILE RADIUS OF THE 289 RURAL HEALTH CENTERS OR 700 SUB-CENTERS. POPULATION REMAINS A PROBLEM WITH ONLY UNCLASSIFIED

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28 PERCENT OF THE POPULATION EFFECTIVELY AWARE OF CONTRACEPTIVES. PROGRAMS FOR DISTRIBUTING CONTRACEPTIVES IN 1977-78 ACHIEVED LESS THAN 50 PERCENT OF THE TARGETS.

THERE IS A SHORTAGE OF HOUSING IN BOTH RURAL AND URBAN PAKISTAN TALLING APPROXIMATELY ONE MILLION UNITS. DEMAND FOR HOUSING IN THE URBAN SECTOR IS APPROXIMATELY 150,000 PER YEAR AND ALMOST AS HIGH IN THE RURAL SECTOR. IN 1977-78 APPROXIMATELY 70,000 HOUSING UNITS FOR LOW INCOME URBAN GROUPS WERE COMPLETED OUT OF A GOAL OF 100,000 UNITS. THE PRIVATE SECTOR IS EXPECTED TO HAVE CONSTRUCTED 40,000 IN FY78. HUMMEL

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